

**Written Testimony, Select Committee on the Modernization of Congress Hearing
“CONSTITUENT SERVICES: BUILDING A MORE CUSTOMER-FRIENDLY CONGRESS”,
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Chair Kilmer, Vice-Chair Timmons, Members of the Select Committee, and staff,

Thank you for holding today’s hearing on Constituent Services, and for your continued leadership and hard work to make Congress stronger and more resilient into the future.

I had the privilege of serving as Director of Constituent Services for the Office of Congressman Seth Moulton [D, MA] until December of 2019. Serving on that team was one of the greatest honors of my life, and the interactions I had with constituents of the Massachusetts sixth district helped shape who I am, personally and professionally.

I have also been a Taxpayer Advocate Service fan for many years, *and* I’ve spent the last few years professionally bothering Matt Lira in my current role as Director of Strategic Initiatives for the POPVOX Foundation, so it is an enormous honor for me to appear with them today.

One of the things that has stayed with me from my experience as a caseworker is how many constituents facing incredible challenges had the grace to stop and ask how their case could be used to prevent similar problems from happening to others in the future.

To answer that question and build a truly constituent-friendly Congress, the House and Senate must find ways to scale constituent services by taking a data-driven approach to learning from casework, and to level the playing field for offices so that constituents have the same great experience no matter where they are in the country. Vital to this effort is supporting the caseworkers tasked with this mission.

In that spirit, it is my privilege to offer four recommendations to build a more constituent-friendly Congress.

Recommendation one: The Chief Administrative Officer should require approved House technology vendors to adopt a system of standardized casework categories and tracking standards, developed and refined in collaboration with caseworkers, and establish-House-wide unified analytics to identify casework trends and potential problem areas.

In several recent studies, both Members¹ and senior Congressional staff² cite constituent services as one of Congress's most important roles, and one of the most rewarding aspects of serving in Congress—more so than legislation or oversight activities. However, what always strikes me about these surveys is the separation between these different roles.

Congressional offices receive rich information directly from those most impacted about how Americans *actually* interact with federal agencies—the “burdens, barriers, and inequities”³ they face in the course of claiming benefits they are entitled to by law. This data can be a valuable independent source of information to contribute to oversight plans, or suggest areas for legislative action. The problem is that this data is siloed between 541 offices.

For context, in our office before the pandemic, we had a standing caseload of around 400-450 open cases (some offices may have very different caseloads). When we worked to develop a more comprehensive case tagging system than the one that came standard to our CRM software, every now and then we'd start to see patterns emerge—a 20% rise in VA Aid and Attendance cases, or a sudden cluster of SSDI cases for cancer patients. But from such a small sample size, we had no good way to tell whether these patterns were just a coincidence or an indicator of something wrong.

To break that data out of its silos, the CAO should work with caseworkers to develop case tagging requirements that better capture the details of individual cases, and to require approved CRM vendors to incorporate the new requirements into existing systems. This could include additional demographic information captured in a Privacy Act Release Form, and circumstantial factors that may play into the case—for example, veteran status, risk of eviction or foreclosure, or relation to a national crisis like COVID-19.

After adoption of the standardized system, the CAO — possibly through the new House Digital Services, as suggested in a forthcoming Lincoln Network report — should develop an opt-in API (like the Connecting With Congress system) allowing individual offices to share anonymized case data to a central repository that would begin to allow the House to track casework trends. This could include dashboards created by the House Digital Services or reports⁴ by the Government

¹“Congress at a Crossroads”, report from the US Former Members of Congress Association, July 2020 <https://www.congress.gov/117/meeting/house/111404/witnesses/HMTG-117-MH00-Wstate-WeichleinP-20210325-SD001.pdf>

²“State of the Congress 2022,” report from the Congressional Management Foundation and Partnership for Public Service, <https://ourpublicservice.org/publications/state-of-the-congress-2022/>

³ Framing from OMB's Request for Information (RFI) on “Methods and Leading Practices for Advancing Equity and Support for Underserved Communities through Government.” See <https://www.popvox.org/blog/popvox-foundation-submission-omb-equity-rfi> for the POPVOX Foundation submission on OMB's Equity RFI, including on what federal agencies can learn from Congressional caseworkers on reducing burdens, barriers and inequities in constituent interactions with the federal government.

⁴ For an example of district-level reports on customer service issues, see the Taxpayer Advocate Service's annual taxpayer statistics: <https://www.taxpayeradvocate.irs.gov/research-studies/>

Accountability Office drawing upon the data. Eventually, committees of jurisdiction might even work with HDS to develop dashboards showing casework trends for the programs they oversee and incorporate aggregate casework data into committee work.

For individual Member offices, the ability to compare caseloads against national averages and understand longitudinal data about their district's needs would allow teams to more effectively deploy limited resources, which may be especially valuable for new offices.

For constituents, this translates to a smarter, more informed, effective casework operation, and in the very long term, fewer casework issues that may have been avoided with effective oversight and reform—a marker of a truly constituent-friendly Congress.

Recommendation two: The Congressional Research Service should create and maintain an updated directory of agency contacts and caseworkers by issue area, available to both Congressional staff and agency liaison staff.

In our office, we had horror stories of agency responses to sensitive constituent cases going to inboxes three caseworkers ago, or agency liaison emails to general email addresses getting caught in out-of-district CRM filters. The same is true for agencies on the other side of the equation: with many agency liaison offices overstretched responding to a record caseload, spending valuable time chasing down inquiries sent to the wrong place prevents liaison staff from responding efficiently to requests.

I would suggest that the CAO partner with the Congressional Research Service and agency liaisons to create and maintain an expanded list of agency liaisons, including field office staff, regional staff, processing center staff, ombuds or advocate staff, IG staff, and other contacts as appropriate for each agency. As work develops on the Congressional Staff Directory this Committee has recommended, I would also suggest that the CAO explore making caseworker contact information and portfolios available to agency liaisons, or provide notifications to agency liaisons when new caseworkers are assigned to relevant agency portfolios.

Beyond eliminating duplicative work and time wasted chasing contacts, this would also have several potential secondary benefits: while there are situations when the agency/caseworker relationship should be adversarial, professionalizing contacts between Member offices and agencies may also allow casework staff and agencies to better partner to proactively message changes in agency policy to constituents—for example, in the pandemic, some offices worked to proactively get the word out to constituents about pandemic-relief programs with relatively low rates of uptake, such as the Emergency Broadband Benefit from the FCC.⁵

⁵“What OMB can learn from Congressional caseworkers on advancing equity and support for underserved communities through government,” report from the POPVOX Foundation, July 6th, 2021. <https://www.popvox.org/blog/omb-rfi-congressional-casework>

Additionally, some of the most challenging aspects of casework are crisis situations: natural disasters, acts of terrorism, and periodic government shutdowns—along with crises like the COVID-19 pandemic or the Afghanistan withdrawal—can all require offices to suddenly surge capacity to handle a sharp increase in urgent constituent requests for assistance and provide coherent, clear information on federal response efforts.⁶ For disasters that span multiple districts or states, this can mean duplicative work with multiple caseworkers contacting the same agency liaisons to ask the same questions. Building the infrastructure and muscle memory to quickly convene ‘war room’ responses, bringing together staff from all impacted Member offices with staff from all responding agencies, can also help streamline the process of providing emergency casework assistance to constituents in a crisis.

Recommendation three: Continue and expand opportunities for caseworkers and other district staff to share best practices, innovations, and case studies, including through ongoing opportunities for in-person professional development.

One of the cases that has stayed with me the most is a retired middle school math teacher who came to our team when her Social Security retirement benefits were suddenly dramatically reduced under the Windfall Elimination Provision. When we could not help her reach a favorable resolution, we focused on the fact that that policy came as such a surprise, and worked with a local civic tech group to create an easy-to-use calculator that we hoped would help other retirees accurately understand their benefits and plan for retirement.⁷ We were proud of the better, more proactive service it allowed us to provide for our constituents—which we hoped would also save us time in casework down the road.

One of the Congress’s strengths is that each office can have the flexibility to adapt to its district’s needs: offices around the country develop their own innovations, tools, tricks, and procedures to make casework better. The problem is that there is no place for these innovations to live so that other offices can find them.

The clunky email or Teams listserv for caseworkers is only accessible by word of mouth and has no permanent, easily-searchable archive. Although I had the opportunity to come to DC to present the calculator with my collaborator from Code for Boston at a Modernization Staff Association briefing, at that time, there were few good places to bring caseworkers together to share ideas and answer questions.

I am thrilled to hear of the CAO’s wonderful work recently to develop the staff coaching program and its associated website and resource collection, and to bring district staff, including

⁶ “The Future of Citizen Engagement,” report by Kathy Goldschmidt and Bradley Sinkaus, Congressional Management Foundation, 2020.

https://www.congressfoundation.org/storage/documents/CMF_Pubs/cmf_citizenengagement_covid-19.pdf

⁷ “A Community Builds an App with Congress,” report by Lorelei Kelly, Georgetown Beeck Center, February 2022 <https://beeckcenter.georgetown.edu/report/a-community-builds-an-app-with-congress/>

caseworkers, together for in-person gatherings. This program has the potential to level the playing field for new offices and caseworkers, stewarding some of the institutional knowledge that characterizes good casework teams in a program that is accessible to all offices. As the program continues to develop, I hope that the CAO will expand the ability for offices to share their own innovations, resources, and tools, including spotlighting external resources that have been helpful in casework.

Collecting these tools in one archivable, searchable format may also help shed light on missing resources that would help offices streamline their services and offer better wrap-around service for constituents by plugging into existing community resources. I would strongly suggest that CRS work with CHA to issue clear guidance on how caseworkers may make referrals to external organizations or share information from external organizations with constituents. I would also suggest that CRS consider providing one-pagers that caseworkers can use and share with constituents on situations where casework is not permissible, including the rule of congressional courtesy, separation of powers, state v. federal jurisdiction, and restrictions on providing legal advice. Having a shareable, authoritative resource would help caseworkers navigate these difficult interactions.

I also want to emphasize the importance of hosting these gatherings in person, in addition to offering an online portal for resources and trainings. The few opportunities I had to attend in-person caseworker meetups were invaluable on many levels: learning different ways of structuring a team, approaching tough cases, sharing resources, and building relationships I could draw on to collaborate into the future—in other words, professional development. I will address this at further length below, but staff retention is vital to good constituent service, and in the private sector, professional development is understood as a key component of staff retention.⁸ While there are many avenues for professional development for DC-based staff, they are fewer and harder to access for staff in the districts. Returning to my second recommendation, in-person caseworker meetups may also be a useful spur to encourage agencies to offer new-staff and continuing education trainings for caseworkers with more regularity and consistency between agencies. Continuing these in-person meetups is an invaluable use of resources for both CAO and Member offices.

Recommendation four: Continue and expand professional and mental health support services for district and casework staff.

⁸ “According to a report by The ExecuSearch Group, 86% of professionals said that they would change jobs if a new company offered them more opportunities for professional development.” Erica Keswin, Harvard Business Review, April 5th, 2022.
<https://hbr.org/2022/04/3-ways-to-boost-retention-through-professional-development?autocomplete=true>

Seeing the grace, courage, and selflessness of ordinary Americans through casework was an honor and a privilege, and the source of a lot of my personal hope for the country. However, casework is also uniquely taxing, and this has only been exacerbated in the pandemic. To borrow concepts from medicine and social work, caseworkers routinely handle secondary trauma, compassion fatigue⁹, and moral injury¹⁰ from normal casework, in addition to interactions with constituents that can be demeaning, threatening, and demoralizing. Caseworkers continue to see caseloads way above pre-pandemic averages for agencies still handling the fallout, coupled with interactions with constituents who are increasingly frustrated, mistrustful, and ready to take it out on frontline Congressional staff. Unlike other fields with similar risks,¹¹ caseworkers are often entry-level staff, and receive little to no formal training in their jobs on professional skills, let alone self-care and burnout prevention.

Burnout, mental health challenges, and professional exhaustion impact Congress's ability to retain caseworkers, which impacts Congress's ability to serve its constituents. I applaud the Select Committee's work thus far on recommendations to support staff, including creating a human resources hub, making the House Office of Diversity and Inclusion permanent, surveying staff on payroll and benefits needs, decoupling staff pay from Member pay, and more. These make a tangible difference toward improving the working environment for caseworkers and all Congressional staff.

I believe many of the recommendations above would help address some of these challenges: building stronger inter-office peer relationships among caseworkers, providing a clearer pathway to translate casework issues into real legislative solutions, and helping share some of the office-by-office innovations that can reduce the sheer grind of casework may all be helpful. Additionally, as I mentioned above, finding ways to offer flexible, fast support for offices facing an

⁹"Compassion fatigue, or secondary traumatic stress disorder, is a natural but disruptive by-product of working with traumatized clients. It is a set of observable reactions to working with people who have been traumatized and mirrors the symptoms of post-traumatic stress disorder (PTSD). Many types of professionals, such as physicians, psychotherapists, human service workers and emergency workers, are vulnerable to developing this type of stress, though only a subset of such workers experience it. The symptoms of compassion fatigue may include feelings of isolation, anxiety, dissociation, physical ailments, and sleep disturbances. Additionally, compassion fatigue is associated with a sense of confusion, helplessness, and a greater sense of isolation from supporters than is seen with burnout." Resource Guide to Trauma-Informed Human Services, Administration for Children and Families.

<https://www.acf.hhs.gov/trauma-toolkit/secondary-traumatic-stress>

¹⁰"Moral injury is the distressing psychological, behavioral, social, and sometimes spiritual aftermath of exposure to [events that contradict deeply held moral beliefs and expectations]. A moral injury can occur in response to acting or witnessing behaviors that go against an individual's values and moral beliefs." Sonya B. Norman, PhD and Shira Maguen, PhD, "Moral Injury," VA National Center for PTSD.

https://www.ptsd.va.gov/professional/treat/cooccurring/moral_injury.asp#:~:text=Moral%20injury%20is%20the%20distressing,individual's%20 values%20and%20moral%20beliefs.

¹¹ For additional information on the psychological and physical hazards of casework and steps Congressional offices can take to mitigate them, please see "What Congress Can Learn from Social Workers," report from the National Association of Social Workers and the POPVOX Foundation, 2021. <https://www.popvox.org/blog/what-congress-can-learn-from-social-workers-about-workplace-safety>

especially acute surge of cases may also go a long way toward preventing the episodic crisis-driven burnout that can be especially taxing.

I would additionally suggest that OEA staff consider a series of site visits to a representative sample of district offices around the country to shadow casework and other district staff to get a sense for the particular challenges and support needs of these vital staff—which would also serve to help ensure that district staff are aware of the support resources available through OEA and others.

Thank you again for attention to this important topic and for the opportunity to testify, and I look forward to your questions.